



**COMPASSKC**

CITY SERVICES AT YOUR FINGERTIPS

**USER GUIDE**



# ABOUT COMPASS KC

**COMPASS KC** is a web portal where you can apply and search for permits, request inspections, search plans and code cases, as well as pay fees online (more online options will be added as they become available). You can access the City of Kansas City's **COMPASS KC** web portal from [kcmo.gov](http://kcmo.gov).

Though any person may access public information in **COMPASS KC**, bona fide account holders, such as contractors, developers, and owners, will have expanded access in order to conduct business necessary to their trade or profession. By establishing an account and creating a login to **COMPASS KC**, these customers have access to tools which allow them to conduct financial transactions, apply for permits, access records and submit service requests of various types related to their project, all from a desktop computer or mobile device such as a tablet or smartphone.

Registration is not required to simply search within the site, but limited information on each item will be available.

# CURRENT COMPASS KC MODULES

**APPLY FOR PERMITS:** Any customer who has created an account may apply for building, burn, special event, etc. as well as pay for permit fees online.

**SUBMIT PLANS:** Customers will submit electronic plans via the eReview portal.

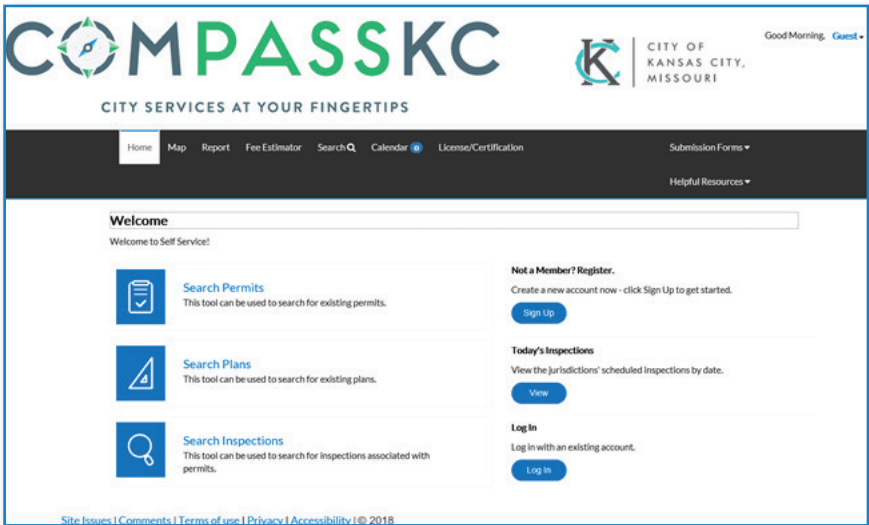
**PLAN REVIEW & PERMIT STATUS:** Check plan review and application status for building permits, certificate of occupancy, plats (preliminary or final), zone cases, and others.

**INSPECTION REQUESTS & STATUS:** Inspections may be requested online, providing both the City and customer with a record of the request. Customers are able to review the status of scheduled and completed inspections in real-time.

**SEARCH CODE ENFORCEMENT CASES:** Search existing code enforcement cases (limited access).

**FEES:** Pay fees online for plans, permits, licensing, and renewals

# COMPASS KC HOME



## SETTING UP YOUR ACCOUNT

For a full range of services, it will be necessary to set up an account.

1. Select **“SIGN UP”**
2. Enter your email address and submit.
  - a. **ATTENTION:** When you create your account, it is critical that you use the email address that you currently use to receive inspection reports and invoices.
3. Confirm your email. From your email inbox, you must verify your email by selecting **“CONFIRM”** from the email which will take you back to **COMPASS KC** to register.
4. Select Register then proceed to enter your personal information. Enter the phone number you would like the city to use to contact you.
  - a. **PASSWORD:** Passwords must have at least one digit ('0'-'9') and one uppercase ('A'-'Z').

## SETTING UP YOUR ACCOUNT *continued*

- b. **ADDRESS:** Enter **Address**, or select address to populate fields below in the search feature.
- c. **ADDRESS TYPE:** Leave “Billing” as the default address if this is where you want correspondence sent.
- d. Select **CHECKBOX** of “I’m not a robot.”

### 5. **SUBMIT**

- a. You will receive an email indicating your registration has been received. After your account has been processed (allow up to 24 hours; Mon. -Fri.), you will receive an email indicating your account has been approved with a link to access **COMPASS KC**.

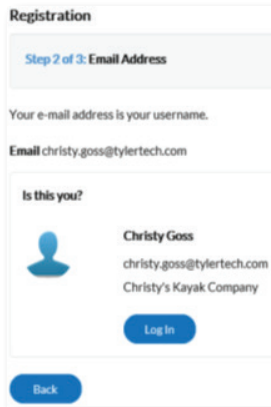
## LOG IN TO COMPASS KC

- 1. Enter your **EMAIL ADDRESS** and **PASSWORD**.
- 2. Mark the Remember me checkbox to have the system remember your credentials.
- 3. Click Log In.

### When registration credentials have been forgotten

- 1. Click the **SIGN UP** option under **NOT A MEMBER? REGISTER**.
- 2. Enter your email address that you previously registered.
  - a. You will be sent a confirmation email. Click Confirm in the email. This will navigate you back to **COMPASS KC** registration site.
  - b. A confirmation of an existing contact in **COMPASS KC** will display.

- c. Click **LOG IN**.



The image shows a mobile app registration screen titled "Registration". It is at "Step 2 of 3: Email Address". The text says "Your e-mail address is your username." and shows the email "christy.goss@tylertech.com". Below this, it asks "Is this you?" and displays a profile for "Christy Goss" with the same email and company name "Christy's Kayak Company". There are two buttons at the bottom: "Log In" and "Back".

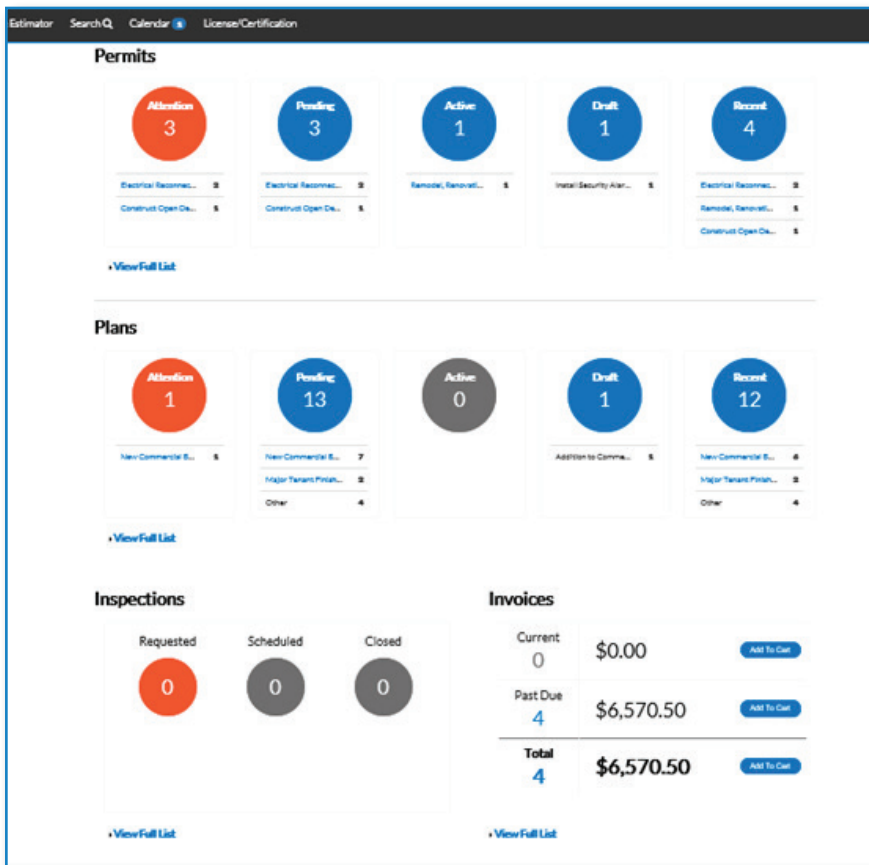
3. Type your email address into the email address field.



The image shows a login screen titled "Login". It has two input fields: "Email Address" and "Password". The "Email Address" field has a red error message "Email address is required" below it. There is a "Remember Me" checkbox. At the bottom, there are two buttons: "Log In" and "Register". Below the buttons, there are links for "Forgot your password?" and "Switch jurisdiction?".

4. Select "**FORGOT YOUR PASSWORD?**".
5. This page will be redirected to a Forgot Password screen.
6. Click **SUBMIT**.
7. An email will be sent to the address that was given.
8. Open the email and click **RESET**.
9. You will be redirected to an **COMPASS KC** window where a new password can be entered and confirmed.

# DASHBOARD



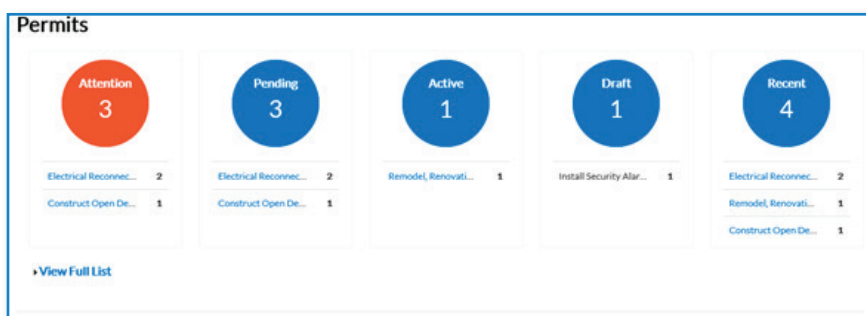
**COMPASS KC** provides the ability for users to see a visual representation of aggregated data on the dashboard. Users can see data for permits, plans, inspections, and invoices. Users can click on the Draft circles to access saved drafts; users can also add unpaid invoices directly to the shopping cart. The dashboard displays data that is contextual to the logged in user.



Follow the steps below to use the dashboard:

1. Click **DRAFT** in the **PERMITS** or **PLANS** section to view saved Permit or Plan application drafts.
2. Click the appropriate status circle in the **PERMITS** section to view a list of the corresponding Permits. Beneath each status circle is a breakdown of the Permit Types. Click **VIEW FULL LIST** to view all Permits.
3. Click the appropriate status circle in the **PLANS** section to view a list of the corresponding Plans. Beneath each status circle is a breakdown of the Plan Types. Click **VIEW FULL LIST** to view all Plans.
4. Click the appropriate status circle in the **INSPECTIONS** section to view a list of the corresponding Inspections. Beneath each status circle is a breakdown of the Inspection Types. Click **VIEW FULL LIST** to view all Inspections.
5. Click **ADD TO CART** next to **CURRENT**, **PAST DUE**, or **TOTAL** in the **INVOICES** section to add the corresponding Invoices to the Shopping Cart. Click **VIEW FULL LIST** to view all Invoices.

# PERMITS



1. **ATTENTION:** By clicking on the **ATTENTION** status circle from the **DASHBOARD**, you will be given a list of all Permit Numbers that have been applied for that have a status of Attention, Project name, Address attached to the Permit, Type, Status and the Reason that the Permit needs the citizen's attention.
2. **PENDING:** By clicking on the **PENDING** status circle from the **DASHBOARD**, you will be given the list of all permit numbers that have been applied for that have a status of Pending, Project name, Address attached to the Permit, Type, Status and Reason.
3. **ACTIVE:** By clicking on the **ACTIVE** status circle from the **DASHBOARD**, you will be given the list of all permit numbers that have been applied for that have a status of Active, Project name, Address attached to the Permit, Type, Status and Reason.
4. **DRAFT:** By clicking on the **DRAFT** status circle from the **DASHBOARD**, you will be given the list of all Permits and Plans that have been saved, but not submitted for review. These drafts may be incomplete and action may resume at any point in time. They may also be deleted from this screen if they are no longer needed.

**My Drafts**

Module  Sort

Module	Type	Last Update	Action
Permit	Residential Accessory Structure	4/12/16 6:31 AM	<input type="button" value="Resume"/> <input type="button" value="Delete"/>

Results per page:  1 - 1 of 1

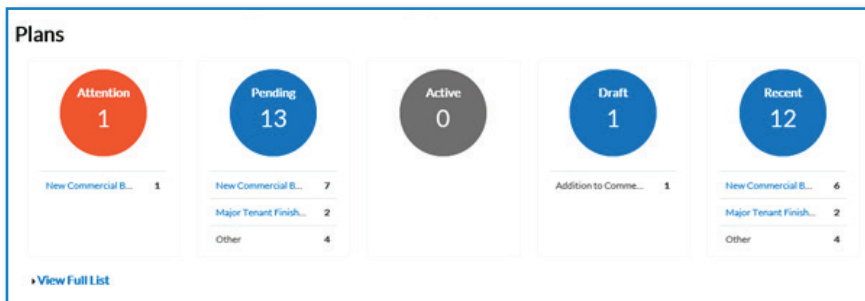
5. **RECENT:** By clicking on the **RECENT** status circle from the **DASHBOARD**, you will be given the list of all Permit Numbers that have been applied for that have a status of Recent, Project name, Address attached to the Permit, Type, Status and Reason.

**My Permits**

Display  Sort

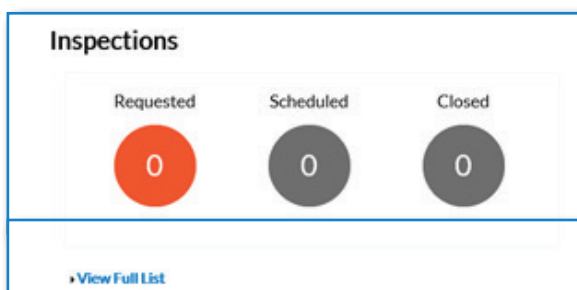
- **DISPLAY:** This dropdown box allows the citizen a way to organize and select one **STATUS** to view.
- **SORT:** This dropdown box allows the citizen a way to sort by **PERMIT NUMBER, PROJECT** or **ADDRESS**.
- **SEARCH BOX:** This box allows the citizen a way to search by **PERMIT NUMBER, PROJECT NAME**, or **ADDRESS** by typing in the information in the box and clicking on the magnifying glass icon.

# PLANS



1. **ATTENTION:** By clicking on the **ATTENTION** status circle from the **DASHBOARD**, you will be given a list of all Plan numbers that have been applied for that have a status of Attention, Project name, Address attached to the Plan, Type, Status and the Reason that the Plan needs the citizen's attention.
2. **PENDING:** By clicking on the **PENDING** status circle from the **DASHBOARD**, you will be given the list of all Plan Numbers that have been applied for that have a status of Pending, Project name, Address attached to the Plan, Type, Status and Reason.
3. **ACTIVE:** By clicking on the **APPROVED** status circle from the **DASHBOARD**, you will be given the list of all Plan Numbers that have been applied for, Address attached to the Plan, Type, Status and Reason.
4. **DRAFT:** By clicking on the **DRAFT** status circle from the **DASHBOARD**, you will be given the list of all Permits and Plans that have been saved, but not submitted for review. These drafts may be incomplete and action may resume at any point in time. They may also be deleted from this screen if they are no longer needed.
5. **RECENT:** By clicking on the **RECENT** status circle from the **DASHBOARD**, you will be given the list of all Plan Numbers that have been applied for that have a status of Recent, Project name, Address attached to the Plan, Type, Status and Reason.

# INSPECTIONS



1. **REQUESTED:** By clicking on the **REQUESTED** status circle from the **DASHBOARD**, you will be given a list of all Inspection Case Numbers that have a status of Requested, Address attached to the Inspection, Inspection Type and Requested Date.
2. **SCHEDULED:** By clicking on the **SCHEDULED** status circle from the **DASHBOARD**, you will be given a list of all Inspection Case Numbers that have a status of Scheduled, Address attached to the Inspection, Inspection Type, Requested Date and Scheduled Date.
3. **CLOSED:** By clicking on the **CLOSED** status circle from the **DASHBOARD**, you will be given a list of all Inspection Case Numbers that have a status of Closed, Address attached to the Inspection, Inspection Type, Requested Date and Scheduled Date.

# INVOICES

## Invoices

Current 0	\$0.00	<a href="#">Add To Cart</a>
Past Due 4	\$6,570.50	<a href="#">Add To Cart</a>
Total 4	\$6,570.50	<a href="#">Add To Cart</a>

[View Full List](#)

**COMPASS KC** users are able to access invoices that are paid, voided, or unpaid. Invoices are accessible from the **DASHBOARD** and the menu system and can be added to the electronic shopping cart.

### Shopping Cart

Total \$8.25

[Check Out](#)

Invoice: INV-00000008

Due Date: 04/06/16

Description: NONE

Billing: Tyler Technologies (Demo, Tyler)

Contact:

\$1.65

[Remove](#)

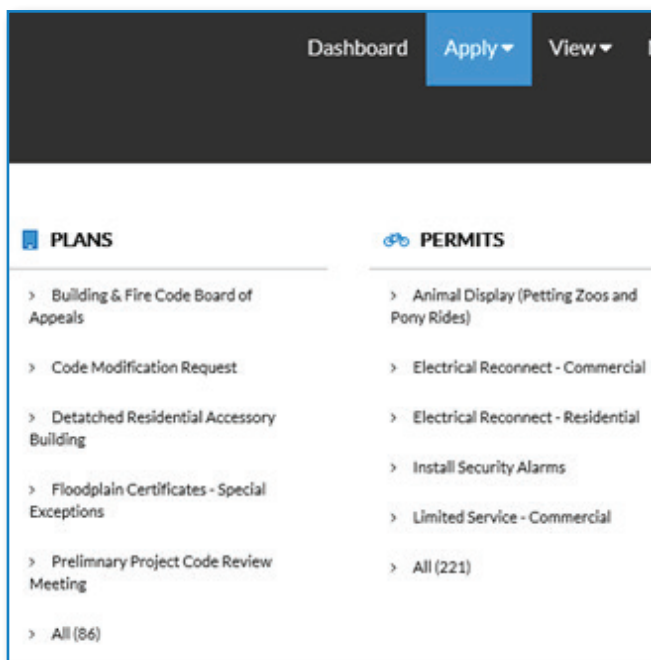
Case Number	Project	Case Address	Amount Due
BIDR-000017-2016			\$1.65

**COMPASS KC's** integrated electronic shopping cart allows citizens to view, add, pay, or remove invoices, and displays single or multiple cases associated with each invoice.

- 1. CURRENT:** By clicking on the **ADD TO CART** oval to the right of Current invoices, the citizen will be able to access the Shopping Cart screen where all current invoices are listed. The citizen may access the Invoice by clicking on the Invoice Number or they may access the Case by clicking on the Case Number. To remove an Invoice from the Shopping Cart, the citizen may click Remove to the right of the invoice. To checkout, click on the Check Out oval to the right of the screen. This will take you to a payment screen to complete the payment for the invoice(s).
- 2. PAST DUE:** By clicking on the **ADD TO CART** oval to the right of Past Due invoices, the citizen will be able to access the Shopping Cart screen where all past due invoices are listed. The citizen may access the Invoice by clicking on the Invoice Number or they may access the Case by clicking on the Case Number. To remove an Invoice from the Shopping Cart, the citizen may click Remove to the right of the invoice. To checkout, click on the Check Out oval to the right of the screen. This will take you to a payment screen to complete the payment for the invoice(s).
- 3. TOTAL:** By clicking on the **ADD TO CART** oval to the right of Total invoices, the citizen will be able to access the Shopping Cart screen where all invoices are listed. The citizen may access the Invoice by clicking on the Invoice Number or they may access the Case by clicking on the Case Number. To remove an Invoice from the Shopping Cart, the citizen may click Remove to the right of the invoice. To checkout, click on the Check Out oval to the right of the screen. This will take you to a payment screen to complete the payment for the invoice(s).

# APPLYING FOR A PERMIT/PLAN

Registered users will click Apply menu to see all available Permits and Plans.



The top five (5) permit/plan types will be displayed above the All option below. If you do not see the permit/plan you want to apply for, then click All at the bottom of the list to access the permit/plan type to apply for all. **COMPASS KC** users can begin applying for cases and resume the application process later. This is helpful when users want to save completed work and then continue when they're ready.

1. Click on **APPLY** and choose from the Permit(s) or Plan(s) listed.
2. The **APPLY FOR PERMIT/PLAN** screen will open and the Type chosen will default under **DETAILS**.



**Apply for Permit**

Step 3 of 10: Basic Information

**PERMIT DETAILS**

- \* **Permit Type**: Residential Deck ☒
- \* **Description**:
- \* **Square Feet**:
- \* **Valuation**:

**ADDRESS**

Billing ☒

Add Address   
 +

**CONTACTS**

**Applicant**

 **Tyler Denson (You)**  
Tyler Technologies  
400 Ferrini, San Luis Obispo, CA, 93405

Applicant ☒

Add Contact   
 +

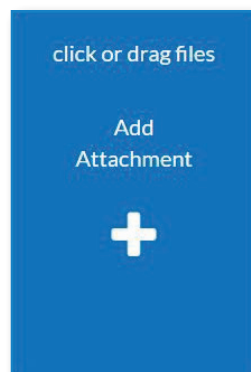
(\*) Denotes that the field is required in order to save the Permit

**DESCRIPTION:** Citizen will need to complete a description of the work that the Permit/Plan is being created for in this field.

**SQUARE FEET:** (may not be required for all types) Citizen will need to provide how many square feet the Permit/Plan will occupy. This value must be greater than zero.

**VALUATION:** (may not be required for all types) Citizen will need to provide the estimated cost of the task that the Permit/Plan relates to in this field. This value must be greater than zero.

3. **ADD ADDRESS:** Select from the dropdown box what type of address is being added. Click on the **+** in the center of the **ADD ADDRESS** card. An **ADD ADDRESS** screen will appear. Enter the full address and click **SEARCH** or the magnifying glass. If your address is located within the municipality, the record for the address will appear. If not, choose **ENTER MANUALLY** if your address is outside the municipality. (**COMPASS KC** Best Practice is to always **SEARCH** first.) Add in the address for the Permit/Plan. The street number, street name, city and postal code are required. Click **SUBMIT**.
4. **CONTACTS:** The registrant's contact information will default to the first Contact card listed. If there are additional contacts that need to be added to the Permit/Plan that is being applied for, click on the **ADD CONTACT +**. Choose from the dropdown box the contact type. In the search box, type in Name, Email, or Company name and click the magnifying glass to search the Global Contacts in **COMPASS KC** for an existing contact. If the person, email or company is an existing contact click **ADD** to add the contact to the application. If contact does not exist in Global Contacts see how to register to add to Global Contact. *Note: Additional contacts can be added later.*
5. **ATTACHMENTS:** Click on the **ADD ATTACHMENT +** card to open Windows Explorer. The citizen may click to insert or drag files into the Add Attachment card. (Certain Permit/Plan types may have required documents that must be attached in order to save.)  
  
**NOTE: This is for application items only. Plan submittals MUST be uploaded using eReviews portal ONLY**
6. **SAVE DRAFT:** Click **SAVE DRAFT** if the information is incomplete and needs to be finished at a later date. The citizen may click on the Draft status circle on the Dashboard to resume their Permit.



7. **NEXT:** Click **NEXT** to be taken to the **ADDITIONAL INFORMATION** page. These fields are customized by the System Administrator. Supply information as requested for the application type you have selected
8. **CLICK NEXT:** Review information submitted and estimated fees, select Back to change information, click Submit to submit application if all information is correct.

**\*\*If fields are left blank and Save Draft, Next or Submit is clicked, an alert box will notify the citizen that information is missing.**

# HOW TO UPLOAD A PDF IN eReviews

1. After the application process is submitted it is now time for you submit an copy of the plans for review. Click **eReviews** tab to begin the upload process.

Plan Number: CRSF-2018-1602

Plan Details | Tab Elements | Main Menu

Type:	Construction of a New Duplex Residential Structure	IVR Number:	104860	District:	<NONE>
Status:	Under Review	Apply Date:	01/18/2018	Project Name:	
Description:	testing	Assigned To:		Expire Date:	
				Complete Date:	

Locations Inspections Fees Sub-Records **eReviews** Attachments Contacts Submittals Holds Meetings More Info

All plans submitted online must be in a PDF format. Clarify appropriate file names, file categories, and uploading procedures with the jurisdiction.

2. Select the plan number you want to submit files.

Plan Number: CRSF-2018-1602

Plan Details | Tab Elements | Main Menu

Type:	Construction of a New Duplex Residential Structure	IVR Number:	104860	District:	<NONE>
Status:	Under Review	Apply Date:	01/18/2018	Project Name:	
Description:	testing	Assigned To:		Expire Date:	
				Complete Date:	

Locations Inspections Fees Sub-Records **eReviews** Attachments Contacts Submittals Holds Meetings More Info

eReviews | Next Tab | Plan Details | Main Menu

eReviews

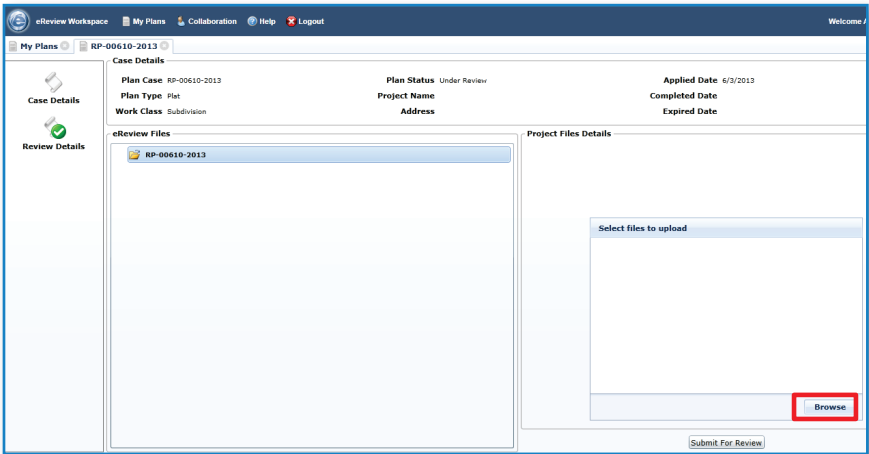
Sort: eReview Number

eReview Number	Status	Plan
CRSF-2018-1602	Waiting for Files	CRSF-2018-1602

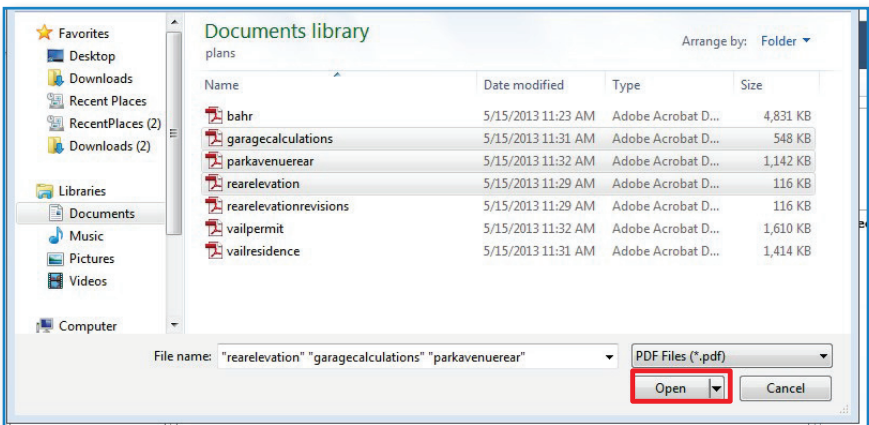
Results per page: 10 1 - 1 of 1

- On the bottom-right of the screen, choose Browse.

**NOTE:** If there is no browse button, then you are not allowed to upload new files at this time.

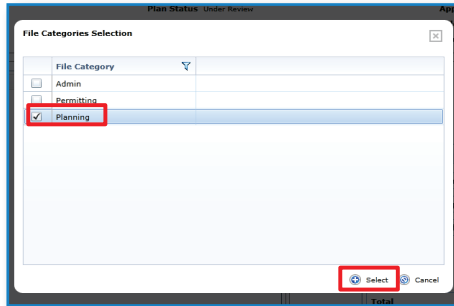


Choose file(s) to upload. You can select multiple files at once.  
Click **OPEN** once the desired files have been selected.

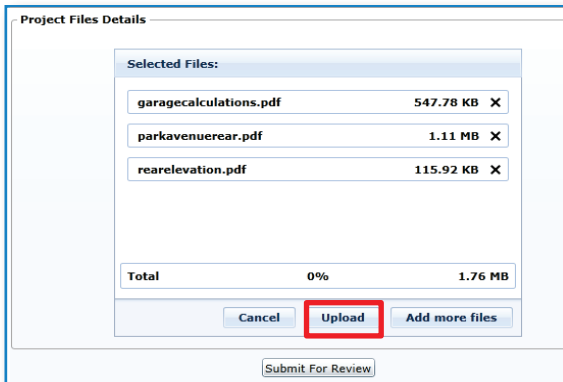


## HOW TO UPLOAD A PDF IN eReviews *continued*

- A pop-up box will appear and ask what file category to submit the files to. Place a **CHECKMARK** in the appropriate box and choose Select.

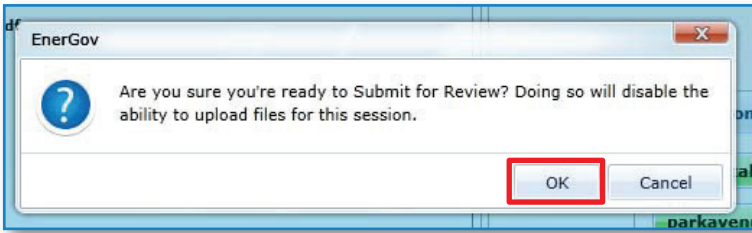


- The files that were just selected will now appear in the Selected Files window. If needed, remove a file by clicking the X to the right. When ready to upload the files, choose Upload.



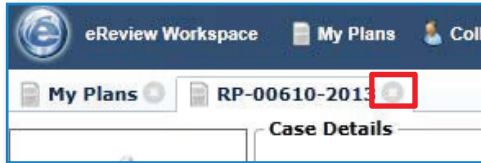
- Verify file upload. The files will turn green, indicating that they have been uploaded successfully. On the left-side of the screen, you will also see a list of the files uploaded. You can click on the folder next to each file to open and see a preview of the file. If the wrong file was uploaded, choose the X next to the file to remove it.

7. Continue to add more files if needed. Once all of the files have been uploaded, choose **SUBMIT FOR REVIEW**.
8. A pop-up box will ask if you are sure you'd like to submit the files. Click **OK** if you are ready.



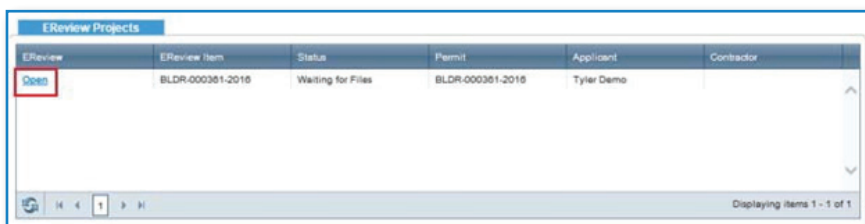
NOTE: Once you submit files for review, you will no longer have the ability to submit new files for this plan until the jurisdiction allows you to.

9. Close the plan case tab to return to the home screen.



# HOW TO VIEW CORRECTIONS IN eReviews

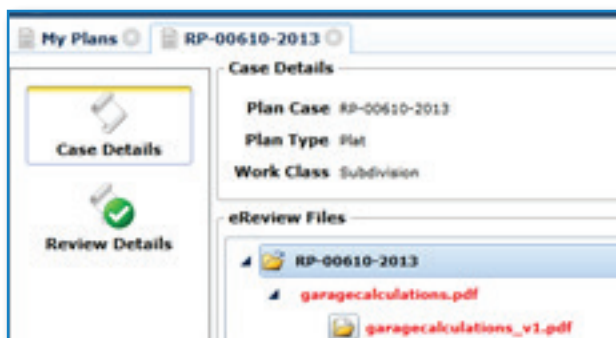
1. When plans have been reviewed and released, you will be able to log in online to view feedback. This involves reviewing the PDF documents and acknowledging corrections (if there are any).
2. Log in to the ePortal with your credentials.
3. Locate the Plan or Permit that has corrections on your files. Click the Open button on the eReviews project details tab.



4. The citizen eReviews portal will log in automatically and will display the case.

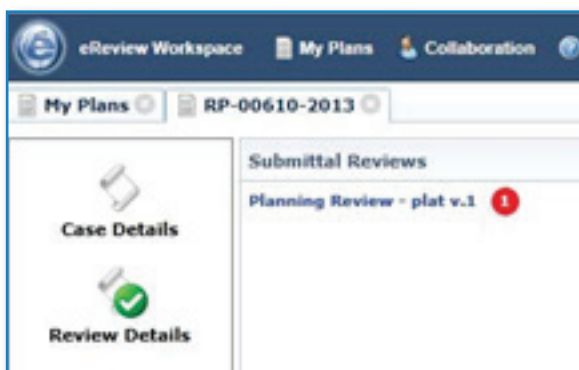
**NOTE:** You must be listed as a contact on the record to access a case online. If you can't find the case, contact your jurisdiction.

5. You will see a list of the documents that were submitted.
6. If a file is red, click on Review Details on the left.





7. A red circle with a number inside will guide you on where the correction comments are located. **Click on the appropriate item(s) under Submittal Reviews.** (See below, the red circle indicates to click on Planning Review – plat v.1. under Submittal Reviews).



8. A list of reviews will appear to the right. Follow the red circle to click on the review(s) that have corrections. (See below, Planning – Peer should be selected to see the corrections as indicated by the red circle).
9. When you **CLICK ON A REVIEW**, you can scroll through the corrections and recommendations tab. If there are corrections, you can use the paper icon to read more about the corrective description, action, summary, and open the related file.
10. Place a checkmark in the Acknowledged checkbox to indicate that you have read/seen the corrections.

**NOTE:** You will not be allowed to upload a new set of plans if the **Acknowledged** checkbox is not selected.

## Corrections:

Click on a review item to see corrections and recommendations below.

Transportation (County)	Under Review	Administrator, System	Plat
Transportation (State) - SHA	Under Review	Administrator, System	Plat
In Gas	Under Review	Administrator, System	Plat
	Under Review	Administrator, System	Plat
	Under Review	Administrator, System	Plat
	Under Review	Administrator, System	Plat
Initial review - Lead Planner	Complete	Administrator, System	Plat
1 Planning - Peer	Denied	Administrator, System	Plat

Click on this folder to open the PDF with the reviewers' feedback.

Click on this icon to view notes from the reviewer

Outlines what needs to be fixed before the next set of plans can be uploaded

Shows notes and corresponding page numbers that were recorded on the PDF

Check this box to indicate that you have read the corrections.

Click on this icon to view notes from the reviewer

Outlines what needs to be fixed before the next set of plans can be uploaded

Shows notes and corresponding page numbers that were recorded on the PDF

Check this box to indicate that you have read the corrections.

## Recommendations:

Click on the Recommendations tab to view additional notes.

Legal Review				Under Review	Administrator, System	Plat
Ability-Pepco				Under Review	Administrator, System	Plat
Transportation (City)				Under Review	Administrator, System	Plat
Initial Review - Lead Planner				Complete	Administrator, System	Plat
1 Planning - Peer				Denied	Administrator, System	Plat
Corrections 1		Recommendations 2		Collaboration		
Recommend Number	Description	Recommend Summary	Related File			
000013			 aragecalculations_v1.pdf			

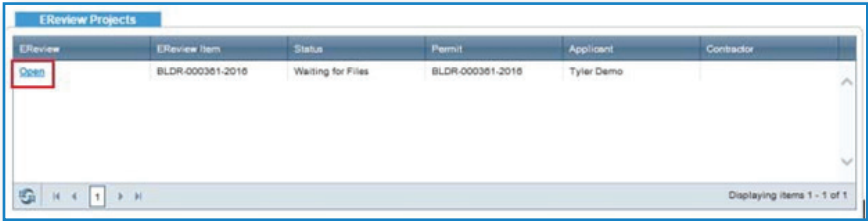
Click on this icon to view notes from the reviewer

Shows notes and corresponding page numbers that were recorded on the PDF

Click on this **folder** to open the PDF with the reviewers' feedback.

# HOW TO UPLOAD FILE REVISIONS IN eReviews

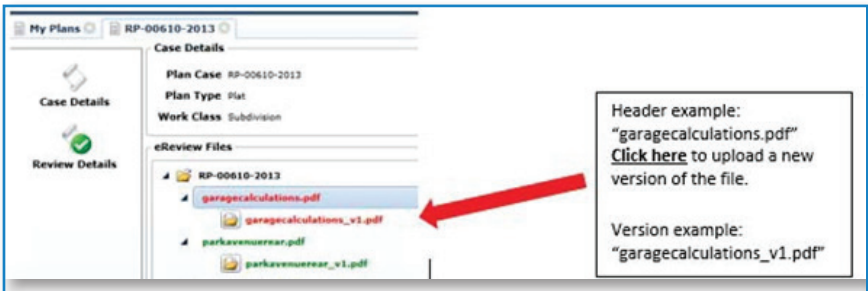
1. Log in to the ePortal with your credentials.
2. Locate the Plan or Permit that has corrections on your files. Click the Open button on the eReviews project details tab.



3. The citizen eReviews portal will log in automatically and will display the case.

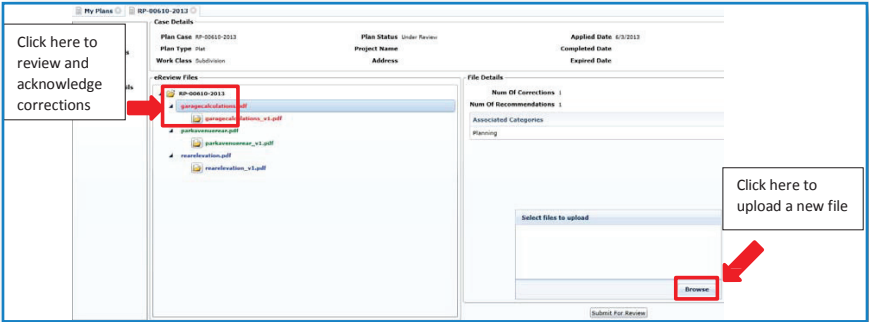
**NOTE:** You must be listed as a contact on the record to access a case online. If you can't find the case, contact your jurisdiction.

4. You will see a list of the documents that were submitted. Each document contains a header and a version number underneath. Click on the header of the file (in the example below, click on garagecalculations.pdf).

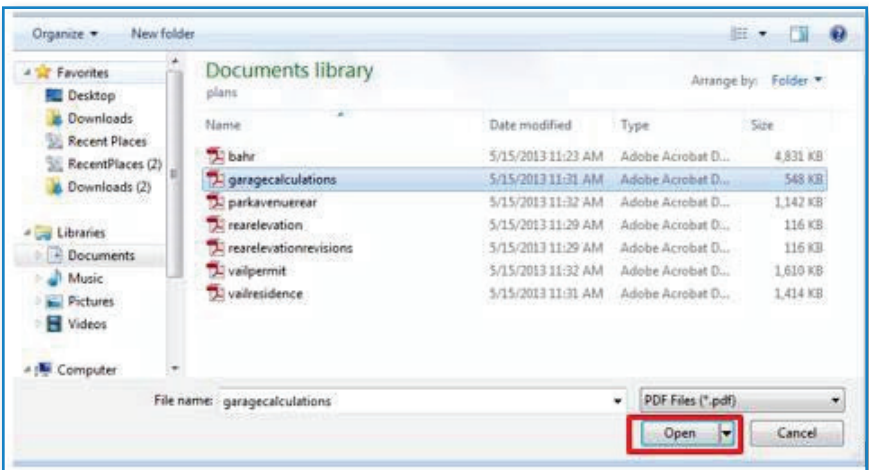


5. Click **BROWSE** on the bottom right.

**NOTE:** If you do not see the browse button then it means either the **ACKNOWLEDGED CORRECTIONS BOX** was not selected (click on **REVIEW DETAILS** and click on the red circles), or you are not allowed to upload a new version of the plan and need to contact the jurisdiction.

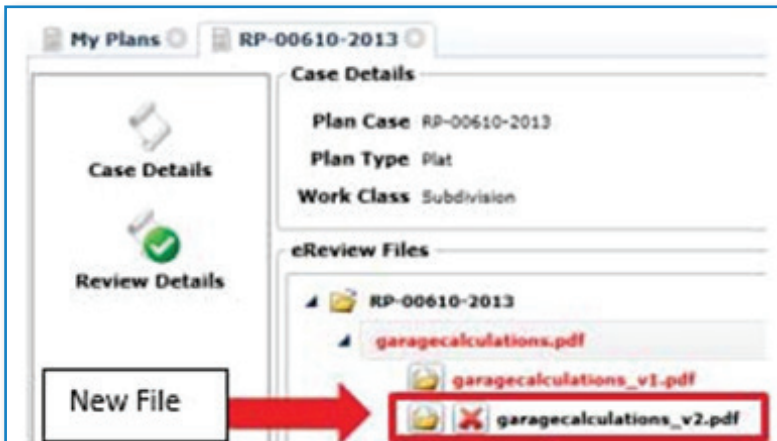


6. Choose which file you would like to attach and then click **OPEN**.



## HOW TO UPLOAD FILE REVISIONS IN eReviews *continued*

- Click **UPLOAD** in the submitted files box. The new file will appear underneath the file heading on the left. It will automatically add a new version reference at the end. For example, the screen shot below shows that garagecalculations\_v2 has been uploaded underneath garagecalculations\_v1. The v2 would appear regardless of the name of the file being uploaded. If this is the third time a file is being uploaded, it will say v3.



- If more than one set of plans need to be uploaded, **REPEAT STEPS 5-7.**
- Once all files are uploaded, click **SUBMIT FOR REVIEW.**

Num Of Corrections 1

Num Of Recommendations 1

Associated Categories

Planning

Selected Files:

garagecalculations.pdf	547.78 KB	X
------------------------	-----------	---

Total	0%	547.78 KB
-------	----	-----------


Cancel Upload

Submit For Review

10. You'll receive a pop-up box asking if you are sure you are ready to submit for review. Click **OK**.

**NOTE:** Once the files are submitted, you will not be able to re-upload files until the jurisdiction allows you to again.

# REQUESTING INSPECTIONS AFTER A PERMIT IS ISSUED

Permit Number: ELER-000147-2016 

Permit Details | Tab Elements | Main Menu

Type: Residential Electrical New Construction	IVR Number: 100211	Application Date: 05/16/2016
Status: Issued	Project Name:	Issued Date: 05/16/2016
Description: dgsidf	District:	Expiration Date: 11/14/2016
Valuation: \$5,678.00	Square Feet: 50.00	Finalized Date:

Address **Inspections** Fees Sub Permits Sub Plans eReviews Attachments Contacts Submittals

Existing Inspections | Remaining Inspections | Next Tab | Permit Details | Main Menu

Existing Inspections Sort: Description ▼

Description	Status	Request Date	Scheduled Date	Inspector	Action
No records to display.					

Remaining Inspections Sort: Description ▼

Description	Reinspection	Action
Electrical Permanent Service	No	<input type="checkbox"/>
Electrical Rough	No	<input type="checkbox"/>
Electrical Temporary Service	No	<input type="checkbox"/>
Electrical Underground	No	<input type="checkbox"/>
Final Electrical	No	<input type="checkbox"/>

Results per page: 10 1 - 5 of 5 < 1 >

[Request](#)

1. Click on the Permit Number of the Permit you would like to request an inspection.
2. The Permit case will open. Click on the **INSPECTIONS** tab.
3. A list of **REMAINING INSPECTIONS** will be at the bottom of the page.
4. Click in the box under **ACTION OF THE INSPECTION** you would like to request. (If Fees are unpaid the Action boxes will not show.) If an inspection you are trying to request is not available contact jurisdiction.



5. Click **REQUEST** at the bottom the page on the right.
6. The **REQUEST INSPECTIONS** screen will open

Request Inspections (1)

1 #ELER-000147 2016

Inspection Type: Electrical Rough

Permit Type: Electrical (Residential)

Address: 900 Del Rio Ave Unit 754B, San Luis Obispo, CA 93405

\* Requested Date

\* Comments

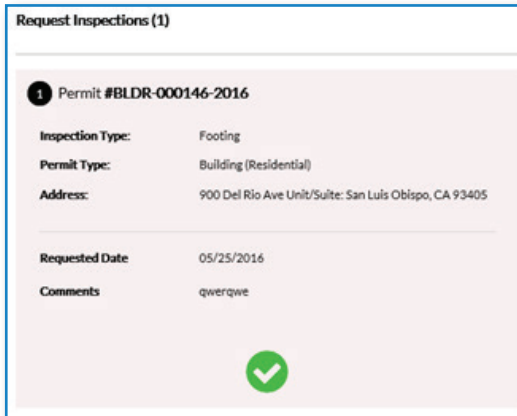
Request

7. Choose a requested date for the inspection by clicking on the calendar to the right of the **REQUESTED DATE** field.
8. Fill in comments about the requested inspection in the **COMMENTS** box.
9. Enter **CONTACT NAME**. (enter additional contact name for contact on site)
10. Enter **CONTACT PHONE**.
11. Click **SUBMIT**.

## REQUESTING INSPECTIONS AFTER A PERMIT IS ISSUED

*continued*

- The inspection information and a green check will pop up in a **REQUESTED INSPECTIONS** screen if it is successfully requested.



The screenshot shows a mobile application interface titled "Request Inspections (1)". It displays the following information:

- 1 Permit #BLDR-000146-2016**
- Inspection Type:** Footing
- Permit Type:** Building (Residential)
- Address:** 900 Del Rio Ave Unit/Suite: San Luis Obispo, CA 93405
- Requested Date:** 05/25/2016
- Comments:** qwerqwe

A large green checkmark is centered at the bottom of the screen, indicating a successful request.

- Navigate back to the Permit Details screen. The inspection will now be listed under **EXISTING INSPECTIONS** in the full list of inspections.

# PAYING FEES

Permit Number: BLDR-000151-2016

- Permit cannot be printed at this time. Permit has unpaid fees.

[Permit Details](#) | [Tab Elements](#) | [Main Menu](#)

Type: Residential Deck	IVR Number: 100216	Application Date: 05/17/2016
Status: Issued	Project Name:	Issued Date: 05/17/2016
Description: Test	District:	Expiration Date: 11/14/2016
Valuation: \$1,000.00	Square Feet: 500.00	Finalized Date:

[Address](#) [Inspections](#) [Fees](#) [Sub Permits](#) [Sub Plans](#) [eReviews](#) [Attachments](#) [Contacts](#) [Submittals](#)

[Remaining Fees](#) | [Paid Fees](#) | [Next Tab](#) | [Permit Details](#) | [Main Menu](#)

## Remaining Fees

Sort Fee ☐

Fee	Invoice	Computed	Amount Due
Building Permit Fee (Residential)	INV-00000059	\$1.00	\$1.00
Building Plan Review Fee	INV-00000059	\$0.65	\$0.65

Results per page  1 - 2 of 2 << < 1 > >>

## Paid Fees

Sort Fee ☐

Fee	Invoice	Computed
-----	---------	----------

No records to display.

To Pay Fees on a Plan/Permit the citizen will need for the case manager to invoice the fees in EnerGov.

1. Navigate into the Plan/Permit of your choice.
2. Click on the **FEES** tab.
3. The citizen can see a list of Remaining Fees and Paid Fees listed with Invoice numbers listed next to the fee name.
4. Click on the **DASHBOARD** tab in the black banner at the top of the screen.
5. Navigate to **INVOICES** at the bottom of the page.

# INVOICES

**COMPASS KC** users are able to access invoices that are paid, voided, or unpaid. Invoices are accessible from the dashboard and the menu system and can be added to the electronic shopping cart.

The screenshot displays an invoice interface. At the top, the 'Invoice Number' is INV-00000006, accompanied by a printer icon. Below this, three columns of information are provided: 'Billing Contact' (Tyler Technologies (Demo, Tyler)), 'Invoice Status' (Invoiced, Past Due), and 'Invoice Date' (04/05/2016); 'Invoice Due Date' (04/05/2016), 'Invoice Total' (\$1.65), and 'Invoice Description' (NONE). A navigation bar contains buttons for 'Primary Fees', 'Misc Fees', 'Payments', 'Attachments', and 'Contacts'. The 'Primary Fees' section is active, showing a table with columns: Fee Name, Fee Total, Amount Due, Reference Entity, Entity, and Notes. The table lists two fees: 'Building Permit Fee (Residential)' for \$1.00 and 'Building Plan Review Fee' for \$0.65, both with a reference entity of BLDR-000012-2016 and entity type of Permit. A 'Sort' dropdown is set to 'Fee Name'. At the bottom, a pagination bar shows 'Results per page' set to 10, displaying '1 - 2 of 2' items, with a blue button for item 1. An 'Add To Cart' button is located in the bottom right corner.

Invoice Number: INV-00000006

Billing Contact: Tyler Technologies (Demo, Tyler)      Invoice Status: Invoiced, Past Due      Invoice Date: 04/05/2016

Invoice Due Date: 04/05/2016      Invoice Total: \$1.65      Invoice Description: NONE

Primary Fees    Misc Fees    Payments    Attachments    Contacts

Primary Fees

Sort: Fee Name

Fee Name	Fee Total	Amount Due	Reference Entity	Entity	Notes
Building Permit Fee (Residential)	\$1.00	\$1.00	BLDR-000012-2016	Permit	
Building Plan Review Fee	\$0.65	\$0.65	BLDR-000012-2016	Permit	

Results per page: 10    1 - 2 of 2    << < 1 > >>

Add To Cart

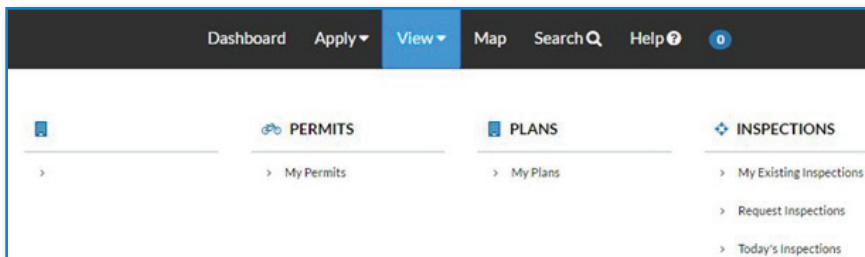
Follow the steps below to view invoice information:

1. Click the printer icon print or save the invoice as a PDF.
2. Click **PRIMARY FEES** to view the **FEE NAME, FEE TOTAL, AMOUNT DUE, REFERENCE ENTITY, ENTITY,** and **NOTES** for all fees associated with the invoice. Select the column to sort the fees by from the **SORT** dropdown.
3. Click **MISC FEES** to view the **FEE NAME, FEE TOTAL, PAID AMOUNT,** and **AMOUNT DUE** for all miscellaneous fees associated with the invoice. Select the column to sort the fees by from the **SORT** dropdown.

4. Click **PAYMENTS** to view the **RECEIPT NUMBER, STATUS, TRANSACTION TYPE, PAYMENT TYPE, PAYMENT AMOUNT, and PAYMENT DATE** for all payments associated with the invoice. Select the column to sort the payments by from the **SORT** dropdown.
5. Click **ATTACHMENTS** to view the **FILE NAME and ADDED DATE** for all files attached to the invoice. Select the column to sort the attachments by from the **SORT** dropdown.
6. Click **CONTACTS** to view the **COMPANY, FIRST NAME, LAST NAME, TITLE, and EMAIL** for all contacts associated with the invoice. Select the column to sort the contacts by from the **SORT** dropdown.
7. Click **ADD TO CART** to add the invoice to the shopping cart.

# VIEW

Click the **VIEW** tab at the top of the **DASHBOARD** screen to access the following: My Permits, My Plans and Inspections.



## MY PERMITS (VIEW)

**COMPASS KC** allows users to view the details of a permit.

**NOTE:** Not all permit data is available to all users.

Follow the steps below to view permits:

1. Type a specific project, address, or permit number to search for in the search field, and click the lookup icon to locate permits that meet the search criteria.
2. Select the statuses of the permits to display in the list from the **DISPLAY** dropdown. See Field Notes below.
3. Select the feature to sort the permits in the list by from the **SORT** dropdown. See Field Notes below.
4. Click a permit number to open the associated permit record.
5. Select the number of permits to display on each page from the **RESULTS PER PAGE** dropdown.
6. Use the page navigation buttons to move between pages of permits.

### MY PLANS (VIEW)

**COMPASS KC** allows users to view the details of a plan.

**NOTE:** Not all plan data is available to all users.

Follow the steps below to view plans:

1. Type a specific project, address, or plan number to search for in the search field, and click the lookup icon to locate plans that meet the search criteria.
2. Select the statuses of the plans to display in the list from the Display dropdown. See Field Notes below.
3. Select the feature to sort the plans in the list by from the **SORT** dropdown. See Field Notes below.
4. Click a plan number to open the associated plan record.
5. Select the number of plans to display on each page from the Results per page dropdown.
6. Use the page navigation buttons to move between pages of plans.

### INSPECTIONS (VIEW)

#### My Existing Inspections

Use this window to view, sort, and access all available inspections. Follow the steps below to view inspections:

1. Type a specific project, address, or permit number to search for in the search field, and click the lookup icon to locate inspections that meet the search criteria.

2. Select the statuses of the inspections to display in the list from the **DISPLAY** dropdown. See Field Notes below.
3. Select the feature to sort the inspections in the list by from the **SORT** dropdown. See Field Notes below.
4. Click a case number to open the associated permit record if desired.
5. Select the number of inspections to display on each page from the **RESULTS PER PAGE** dropdown.
6. Use the page navigation buttons to move between pages of inspections.

## REQUEST INSPECTIONS (VIEW)

**COMPASS KC** provides a great way for users to request inspections. Users must be logged in to **COMPASS KC** to request inspections, and they must be a contact associated with the case. Multiple related/unrelated inspections can be requested simultaneously. Inspection requests interact with the inspection-related data on the dashboard.

Follow the steps below to view inspections:

1. Type a specific permit number, address, or inspection type to search for in the search field, and click the lookup icon to locate inspections that meet the search criteria.
2. Select the feature to sort the inspections in the list by from the Sort dropdown. See Field Notes below.
3. Click a permit number to open the associated permit record. Or, mark the checkboxes next to permits that inspections need to be requested for, and click Request Inspection to open the Request Inspections window.




4. Select the number of inspections to display on each page from the Results per page dropdown.
5. Use the page navigation buttons to move between pages of inspections.

## TODAY'S INSPECTIONS (VIEW)

Use this window to view, sort, and access all inspections scheduled for a specific day. Follow the steps below to view inspections:

1. Type a specific case number, inspection type, or address to search for in the search field, and click the lookup icon to locate inspections that meet the search criteria.
2. Type the date to view due inspections for in the **DATE** field, or click the calendar icon to select the date.
3. Mark the **EXCLUDE COMPLETED** checkbox to exclude completed inspections from the list of results.
4. Select the feature to sort the inspections in the list by from the **SORT** dropdown. See Field Notes below.
5. Select the number of inspections to display on each page from the **RESULTS PER PAGE** dropdown.
6. Use the page navigation buttons to move between pages of inspections.

# MAP

**KANSAS CITY** | MO

Enter Street Address

Search/ToolsResultsPrint MapDownload

Measure

Name:

Kiva PIN:

County APN:


Subdivision:

Landmark Search:  
Category:   
Type:   
Landmark:

Street Intersections:  
Prefix:  \*Street:  Type:   
Prefix:  \*Street:  Type:

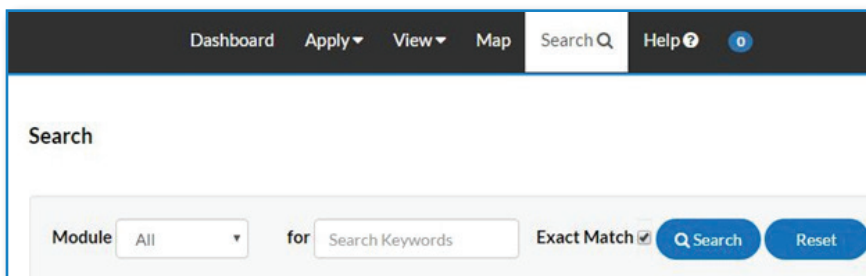
Streetsight:

Go to XY: (State Plane Missouri West - Feet)  
X:    
Y:



# SEARCH

Users can perform robust searches across several key areas in **COMPASS KC** (i.e., permits, plans, inspections, and addresses) from one centrally accessible location. Users do not have to be logged in to **COMPASS KC** to access the global search tool.



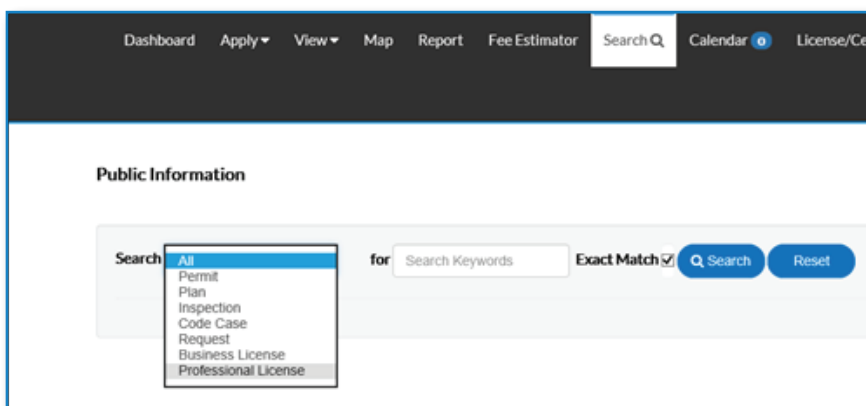
Dashboard Apply View Map Search Q Help ? 0

Search

Module All for Search Keywords Exact Match ☒ Search Reset

Follow the steps below to search:

1. Select the type of record to search for from the Module dropdown or leave “All.”



Dashboard Apply View Map Report Fee Estimator Search Q Calendar 0 License/Ce

Public Information

Search All Permit Plan Inspection Code Case Request Business License Professional License for Search Keywords Exact Match ☒ Search Reset

2. Type relevant search keywords in the for field.
3. Click **SEARCH** to display a list of results that meet the search criteria. Click **RESET** to clear the entered search criteria.

## PERMIT

Not all fields need to be utilized.

1. Type at least part of the permit number to search for in the **PERMIT NUMBER** field.
2. Type at least part of the name of the project associated to the permit to search for in the **PROJECT NAME** field.
3. Select the type of permit to search for from the **PERMIT TYPE** dropdown.
4. Type at least part of the address associated to the permit to search for in the **ADDRESS** field.
5. Type a range of permit issue dates to search for permits within in the **ISSUE DATE** and **TO** fields, or click the calendar icons to select the dates.
6. Type a range of permit expiration dates to search for permits within in the **EXPIRE DATE** and **TO** fields, or click the calendar icons to select the dates.
7. Type a range of permit finalization dates to search for permits within in the **FINALIZED DATE** and **TO** fields, or click the calendar icons to select the dates.
8. Click **Search** to display a list of results that meet the search criteria. Click **RESET** to clear the entered search criteria. Click **ADVANCED** to hide the search criteria.

### PLAN

Not all fields need to be utilized.

1. Type at least part of the plan number to search for in the **PLAN NUMBER** field.
2. Type at least part of the name of the project associated to the plan to search for in the **PROJECT NAME** field.
3. Select the type of plan to search for from the **PLAN TYPE** dropdown.
4. Type at least part of the address associated to the plan to search for in the **ADDRESS** field.
5. Type a range of plan application dates to search for plans within in the **APPLIED DATE** and **TO** fields, or click the calendar icons to select the dates.
6. Click **SEARCH** to display a list of results that meet the search criteria. Click **RESET** to clear the entered search criteria. Click **ADVANCED** to hide the search criteria.

## INSPECTION

Not all fields need to be utilized.

1. Type at least part of the **INSPECTION NUMBER** to search for in the Inspection Number field.
2. Type at least part of the address associated to the inspection to search for in the **ADDRESS** field.
3. Type a range of inspection request dates to search for plans within in the **REQUESTED DATE** and **TO** fields, or click the calendar icons to select the dates.
4. Type a range of inspection schedule dates to search for plans within in the **SCHEDULED DATE** and **TO** fields, or click the calendar icons to select the dates.
5. Click **SEARCH** to display a list of results that meet the search criteria. Click **RESET** to clear the entered search criteria. Click **ADVANCED** to hide the search criteria.
6. Click on a record number in the list of search results to open the associated record.

# ASSISTANCE

If you require assistance with **COMPASS KC**, send an email to **[compasskc@kcmo.org](mailto:compasskc@kcmo.org)**.



CITY OF  
KANSAS CITY,  
MISSOURI